User Manual for the SAP Business Objects BI Platform 4.1 System (BI Suite)

CONTENTS

Section 1: Getting Started with BI Suite

Login

BI Suite is accessed through a channel in MyEd so you must first be registered with EASE to gain access to BI Suite. Once logged into MyEd you will need to add a channel called Reporting + Analytics. To open BI Suite click on the box that says 'Start BI Launchpad'

This will open up a new window and take you to the BI Suite home page

Finding and Opening Documents

On the home page you can see a list of any recently viewed documents and you can click on the document name to open these. If you want to see all documents you need to click on the 'Documents' tab at the top left of the page.

Your personal documents will be held in the drawer titled My Documents, which has a folder called My Favourites and an Inbox. In the folder called My Favourites you will see a list of your personal documents and in the Inbox you will see any documents that have been sent to you by other users. If you are unsure which folder a document is held in you can use the search function by typing the name of the document (or part of the name) into the search bar at the top of the page. This will show you any reports that match what you have searched for and which folders they are in. (please note the reports listed below are examples only)

Viewing Existing Documents

To view an existing document, click on the document name. The report results will now be shown on the screen or you will be prompted to enter some details for the report to run e.g. dates. Note: It is best to click on 'refresh data' to allow any changes in data to be reflected in the report.

Saving and Closing a Document

Documents are saved by selecting the save icon from the toolbar. You will be prompted to give your document a name and it will be saved to your favourites folder.
**Tip:** Click on the advanced button to set your report to refresh on open

Deleting a Document

Highlight the document in your list of documents by clicking on it once. Go to the organize menu at the top of the screen and select Delete.

Printing Documents

You can print reports directly from BI suite by clicking on the print button at the top of the report. A print options box will appear where you can select the printer you wish to print to, the number of pages, paper size, orientation etc and then you click OK.
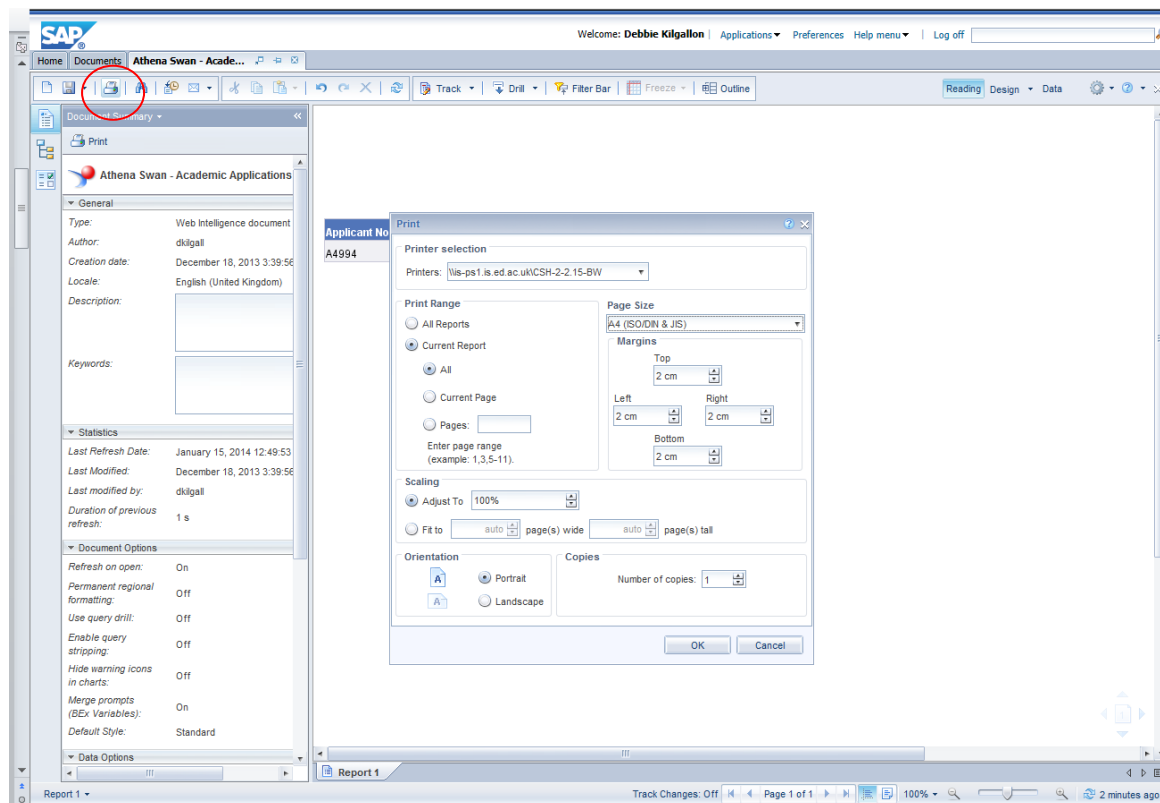
Exporting Reports to Excel

To export a report into Excel you need to click on the arrow next to the Save icon in the toolbar and select 'Save as' and then select where you want to save the document (i.e. My Computer, My Desktop etc), make sure the 'Files of Type' box shows 'Excel' and click save. You then need to go to the location you have saved the document in and open it in excel. **Please Note: I**f your settings for Web Intelligence are set to HTML rather than Applet, there is a slightly different process for exporting documents to excel.

Applet:

HTML:

Corporate Documents

These documents are reports which can be run by any BI Suite user and are located in the drawer called 'Folders'.

The security set-up is such that each user will see only the information relating to his/her own College/Support Group. It is advisable to set the document to refresh automatically so that other users will be able to see their own data.

Corporate Documents can be saved as personal documents and then edited to meet your own requirements.

Amending Corporate Documents

It is possible to amend a corporate document for your own use which you can then save in your 'My Favourites' folder if you wish. Please note, standard users cannot add anything to the query of a corporate document, they can only amend the results objects shown in the report and the layout of the report.

When you run the report that you want to use it will display in 'Reading' mode. In order to amend the report you need to change to design mode and select the option 'With Data':
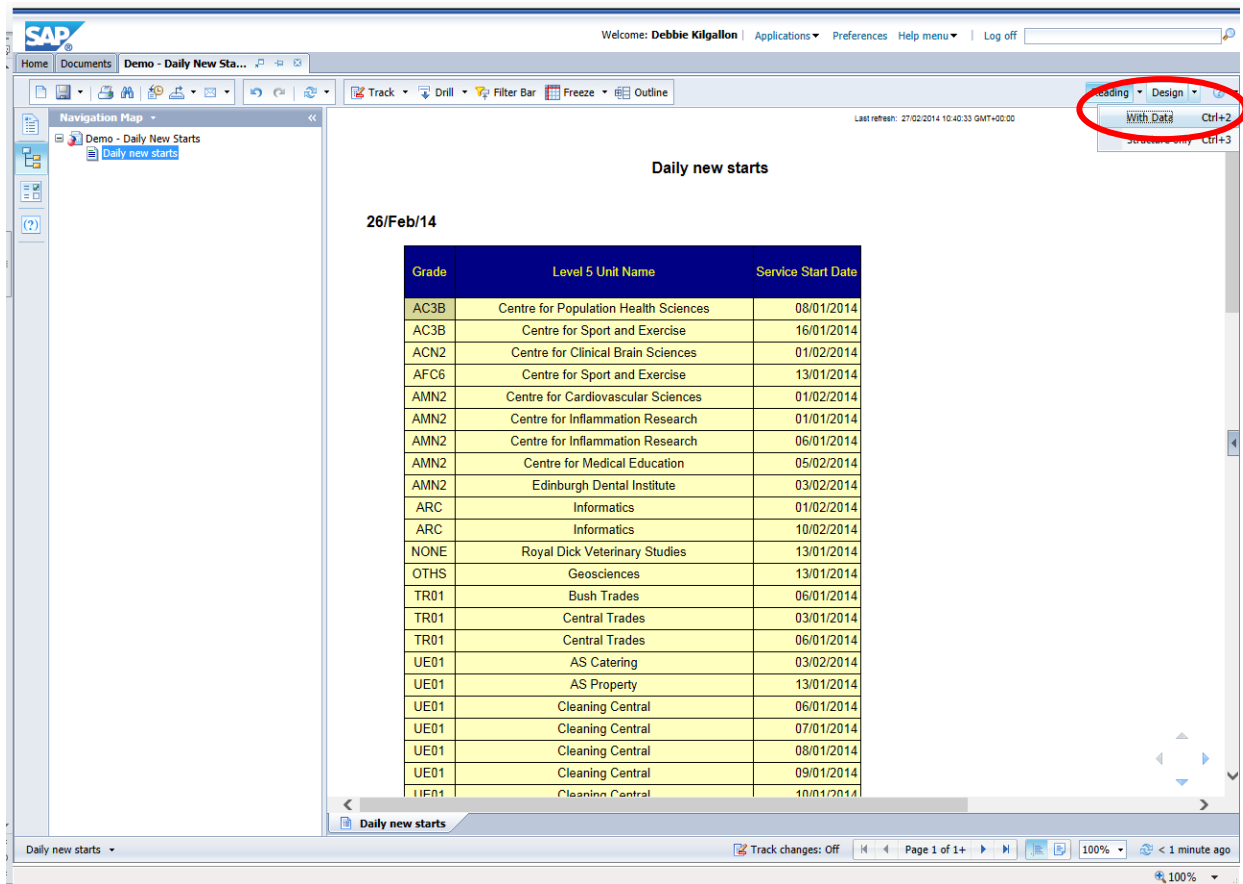
You then need to select the option to show all the objects in the report at the left of the screen:
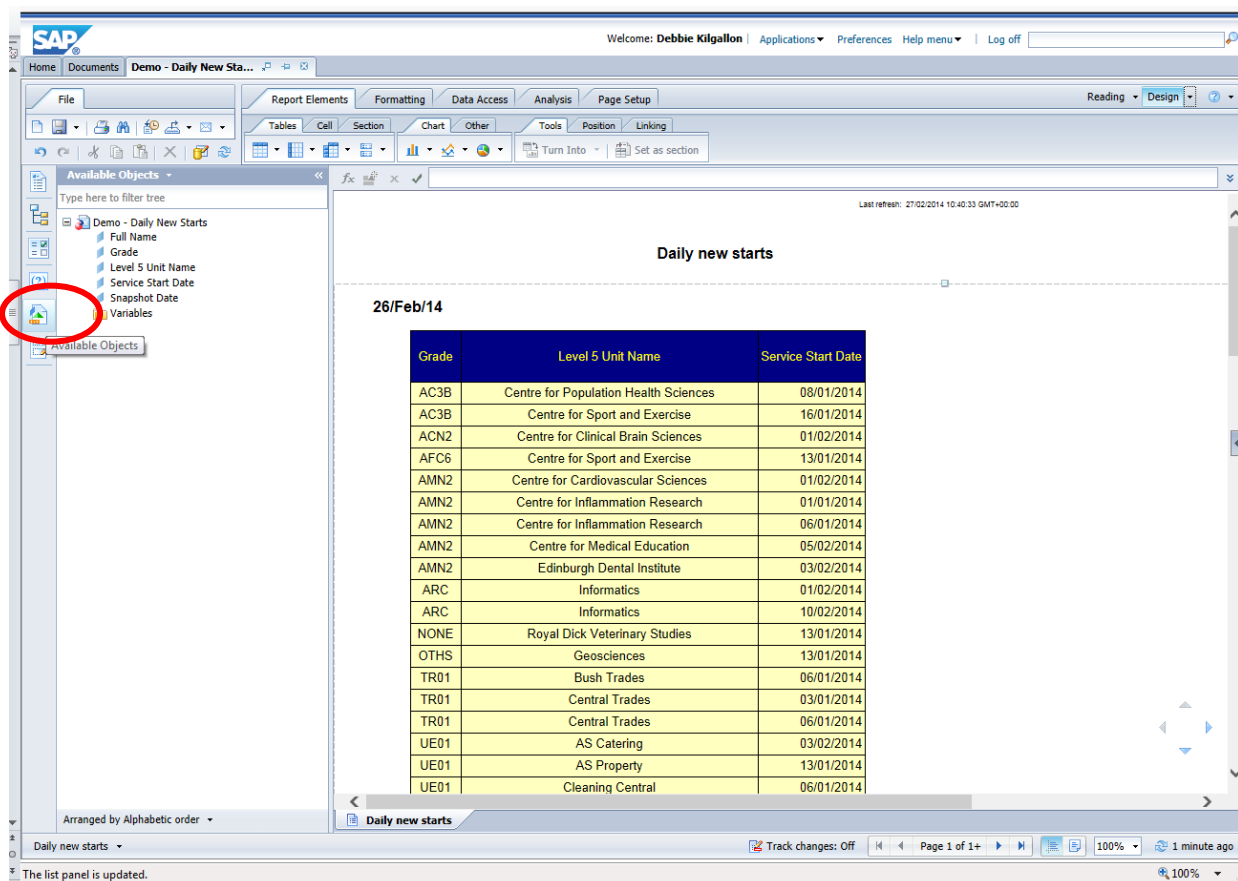
Once you have done this you can drag and drop objects in or out of the report as required. When dragging items into the report if you hover over an existing column the item you are dragging in will replace the existing colum. If you hover at the end of the column the item you are dragging will be inserted as a new column:

The tabs at the top of the report allow you to change the format of the report e.g. colours, fonts text size etc. From here you can also add in additional tables, cells, formulae etc.

e.g. if you want to add a title to the report or add a total to a numerical column. Please see some examples below:

Log out of BI Suite

To exit from BI Suite, click on the Log off option on the right hand corner of the screen. Be careful not to log completely out of EASE if you are running other EASE applications or these will close down as well.

Section 2: Sharing Data with Colleagues

Sending Documents

A document can be sent to any other BI Suite user. If a document is sent through this system, it will be found in the section marked Inbox.

To send a document, highlight the document in your list, click the 'Send' command on the tool bar and choose 'BI Inbox' from the drop down list. This will call up the following screen
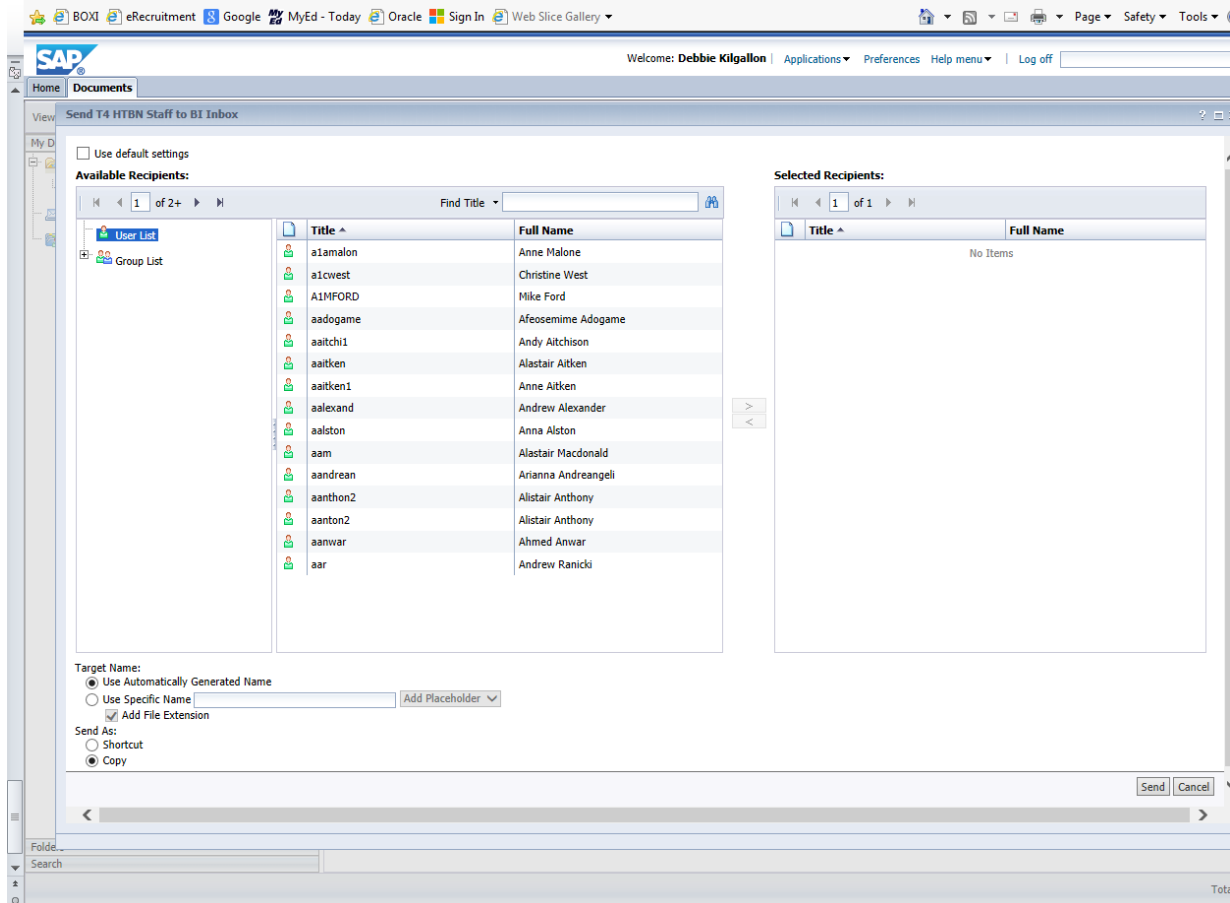
You can search for a user by typing a username in the box marked 'Find title' and then click the binoculars next to the box or you can scroll through the 'available recipients' list to select the user that you want. Once you find the user that you want you need to click on the arrow to put that user into the 'selected recipients' box. Once you have all the users that you want in the 'selected recipients' box you need to click in the radial button next to 'copy' under Send As: and then click on the send button at the bottom of the screen.

View
My D

Send T4 HTBN Staff to BI Inbox   ? □ ✕

☐ Use default settings

Available Recipients:

|◄ ◄ | 1 | of 2+ ► ►| Find Title ▾ | susanm | 🔍

	Title ▲	Full Name
🔍	Find result for "susanm" in "User List"	
👤	User List	
👥	Group List	

	Title ▲	Full Name
👤	a1amalon	Anne Malone
👤	a1cwest	Christine West
👤	A1MFORD	Mike Ford
👤	aadogame	Afeosemime Adogame
👤	aaitchi1	Andy Aitchison
👤	aaitken	Alastair Aitken
👤	aaitken1	Anne Aitken
👤	aalexand	Andrew Alexander
👤	aalston	Anna Alston
👤	aam	Alastair Macdonald
👤	aandrean	Arianna Andreangeli
👤	aanthon2	Alistair Anthony
👤	aanton2	Alistair Anthony
👤	aanwar	Ahmed Anwar
👤	aar	Andrew Ranicki

[>]
[<]

Selected Recipients:

|◄ ◄ | 1 | of 1 ► ►|

	Title ▲	Full Name
👤	susanm	Susan McLaren

Target Name:
◉ Use Automatically Generated Name
◯ Use Specific Name [   ] [Add Placeholder ▾]
  ☑ Add File Extension
Send As:
◯ Shortcut
◉ Copy

[Send] [Cancel]

◄   ►

Folde
Search

Total: 8

Please Note: only advanced users can build reports and/or amend queries

Definitions – Objects, Classes and Universes

Objects

Objects are elements in a Universe that correspond to a selection of data in the database. Object names are often the same business terms that you use in your everyday activities. Examples of object names, employee number, Full name, Salary, Funding

Objects are used to build queries and to retrieve data for reports. A description will appear at the bottom of the screen when each object is selected.

Classes

Classes are logical groups of related objects. For example, the Organisation class contains College/Support Group, School/Planning Unit, and Organisation name objects.

Universes

A universe is a logical group of classes. The universes used by Human Resources are HR_PPIP Management Information (which gives access to employee information) and HR_eRecruitment

```
                          Universe
                             |
        ┌────────────────────┼────────────────────┐
      Class               Class               Class
                             |
                  ┌──────────┼──────────┐
               Object     Object     Object
```
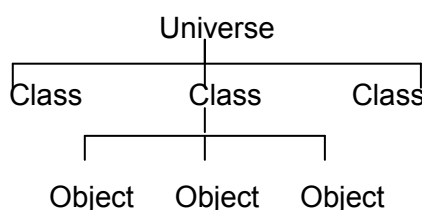
Access to a specific Universe can be requested from the HR Systems Team by filling in an Access to HR Data form (HR form 85).

The Web Panel

Queries are built in the Web Panel which consists of:

1. Classes and Objects
2. Section and Table
3. Object Description
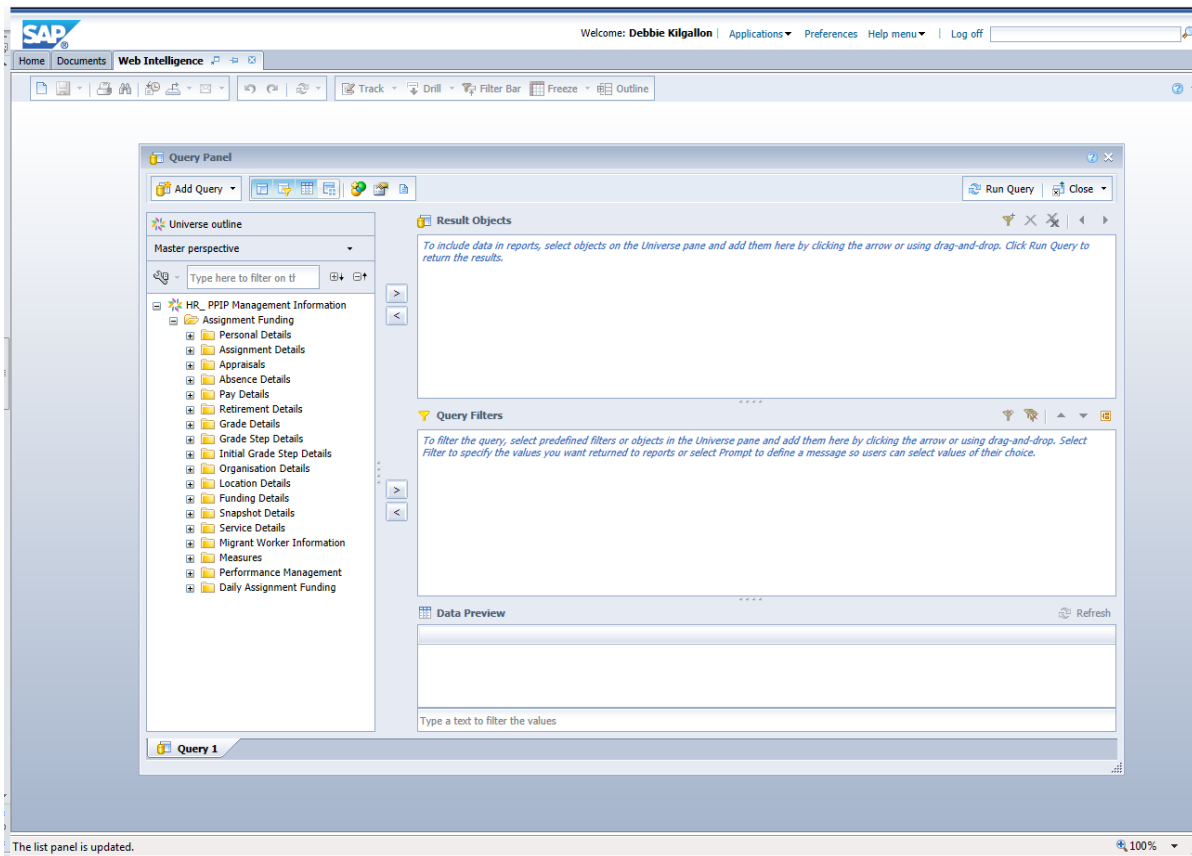
1. Classes and Objects

The data box shows you the available classes and objects in your selected universe. From this box you will select the objects you want in your report.   See Field Names and Descriptions for the full list of classes and objects in the PPIP Man Info Universe.

When the Query Panel opens, the class folders are closed. Clicking on the + sign next to the class will expand the folder to show the objects it contains.
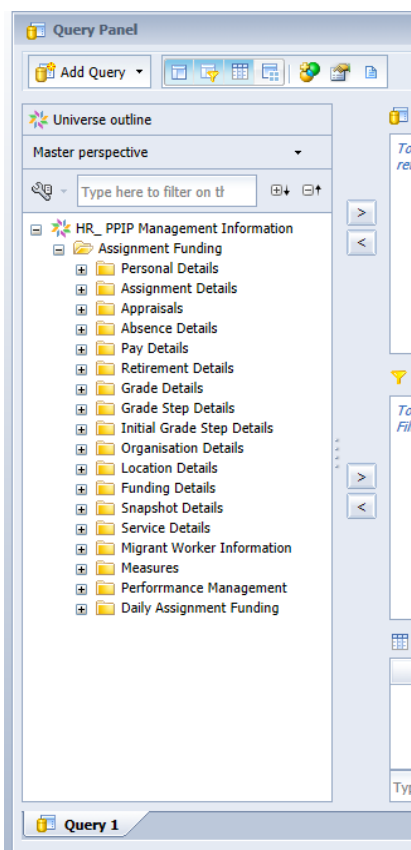
Each Class can be contracted again by clicking on the minus sign.

Please note: The classes shown on the screen should be used if historical information is required. If you wish to produce a report using current data, click on the + sign next to 'Daily Assignment Funding' which will produce all the daily classes and objects.

Care should be taken not to mix up the daily and historical classes (i.e. if current data is required, ensure all objects selected are within the 'daily' classes) otherwise the information returned will not be accurate or the report may not run.

2. Result Objects

The section on the right is where the objects from the Classes and Objects box are placed to define the data retrieved by the query.
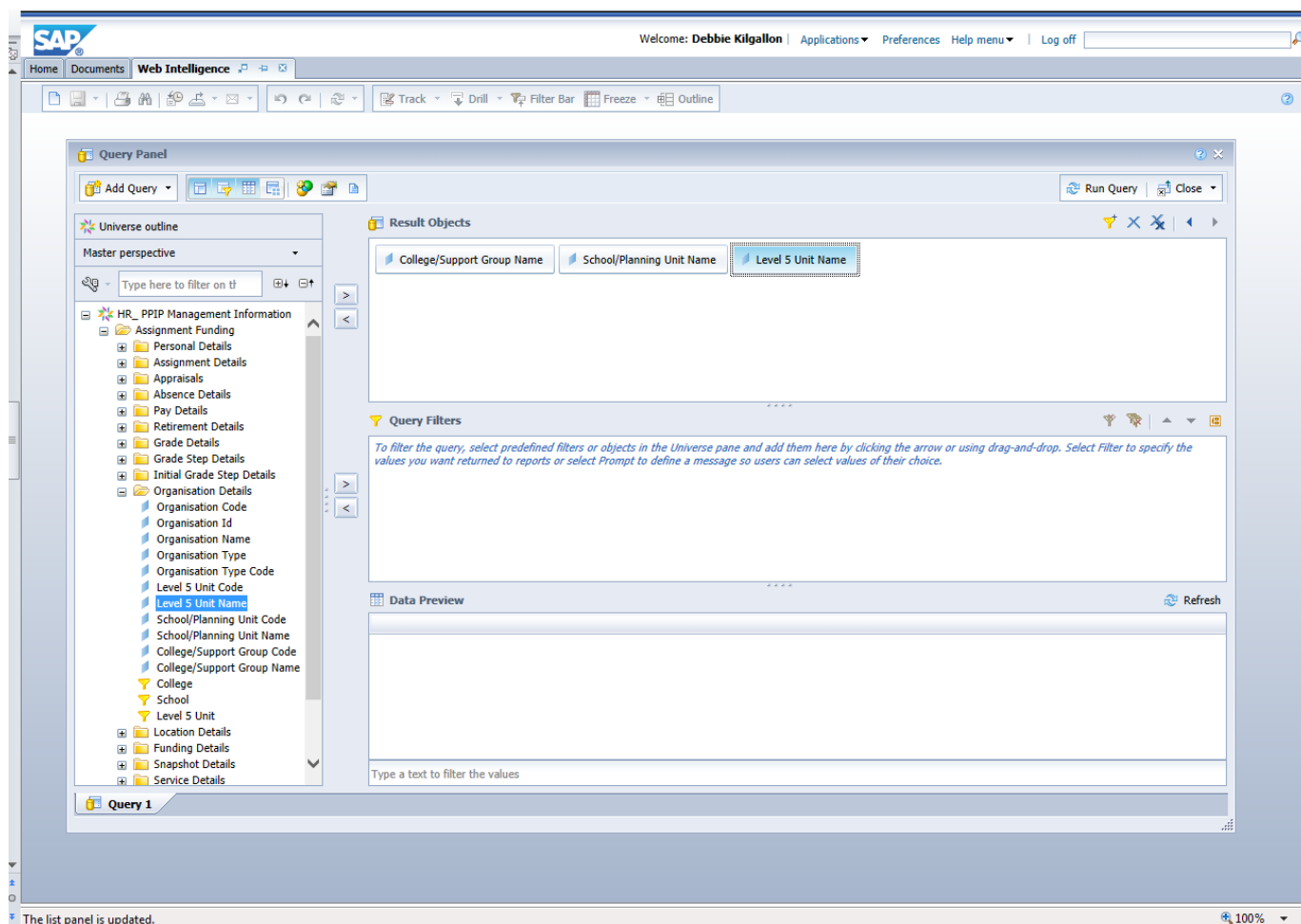
Clicking on run query at the top of the page will pull the data you have requested from the universe.
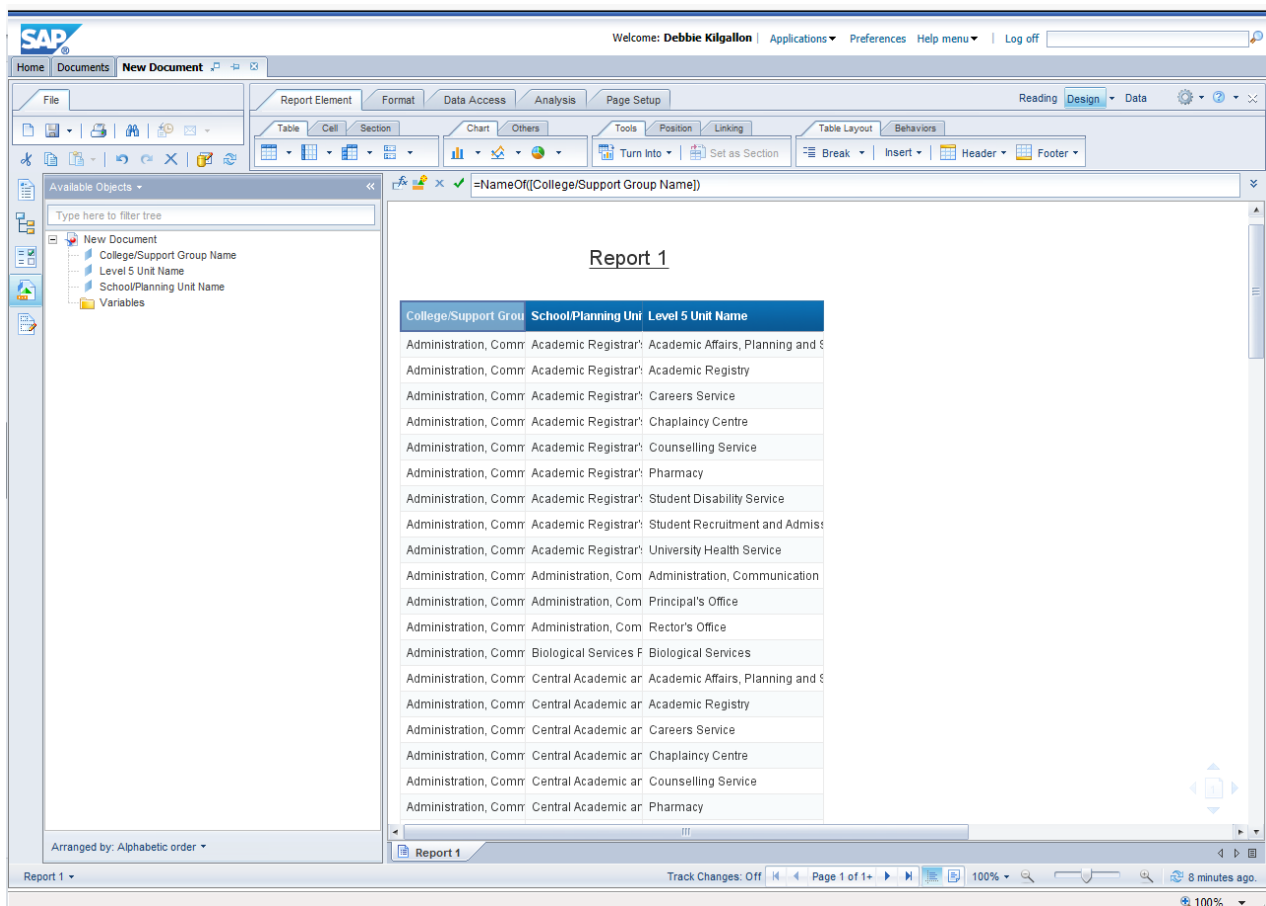
3. Object Description

The description of the object can be seen when you hover the mouse pointer over the object name, when the object is selected.
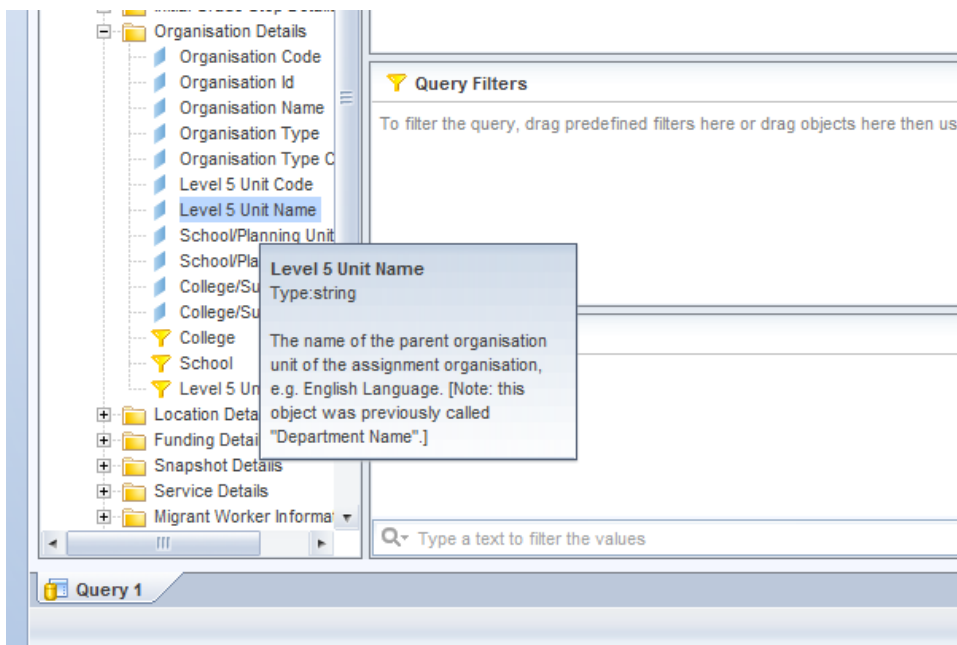
Creating a new document by building a query

From the Home Page click on Applications and select Web Intelligence from the list which opens a new tab. Click on the new document icon on the toolbar and select 'Universe' from the list and click OK. This then brings up your list of universes to choose from. Staff information is contained in the HR_PPIP Management Information Universe.
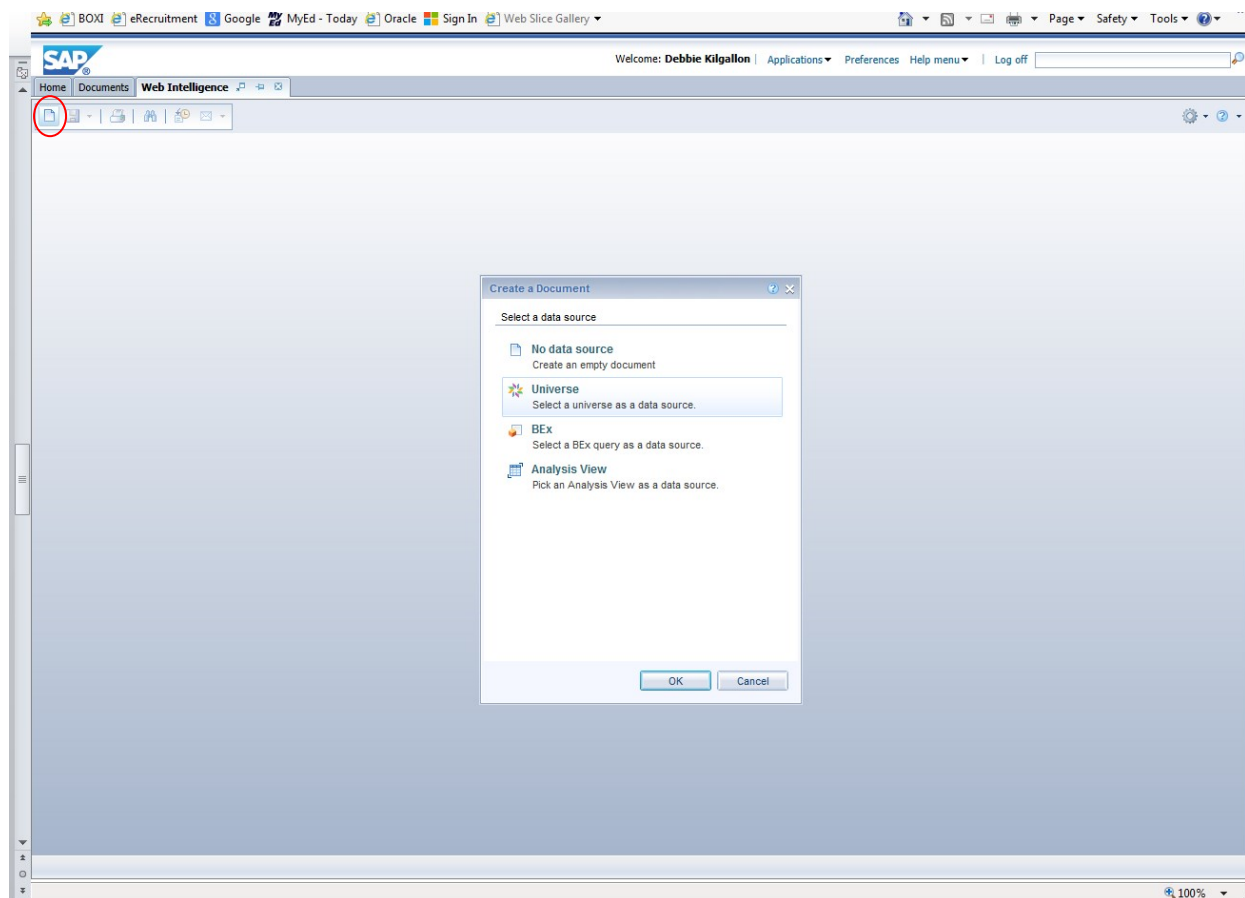
Adding and Removing Objects to a Query

There are several ways to move objects into, and out from, the Result Objects box.

To add an object to a query, you can:

- Drag and drop an object into the Result Objects box
- Double click on an object – the object is added to the end of the query

To delete an object from a query:

- Drag and drop it back into the Data box
- Select the object and press the Delete key

To run the query, click on the *Run Query* button at the top of the screen.

The amount of data returned can be reduced by setting up restrictions in the Query Filters area. See Section 3 – Restricting Data

The following selection will show all Schools within all Colleges.

Editing the Results of a Query

There are two ways to edit the results displayed by a query:

- ➤ Edit the query in the conditions panel and rerun it which will change the output data
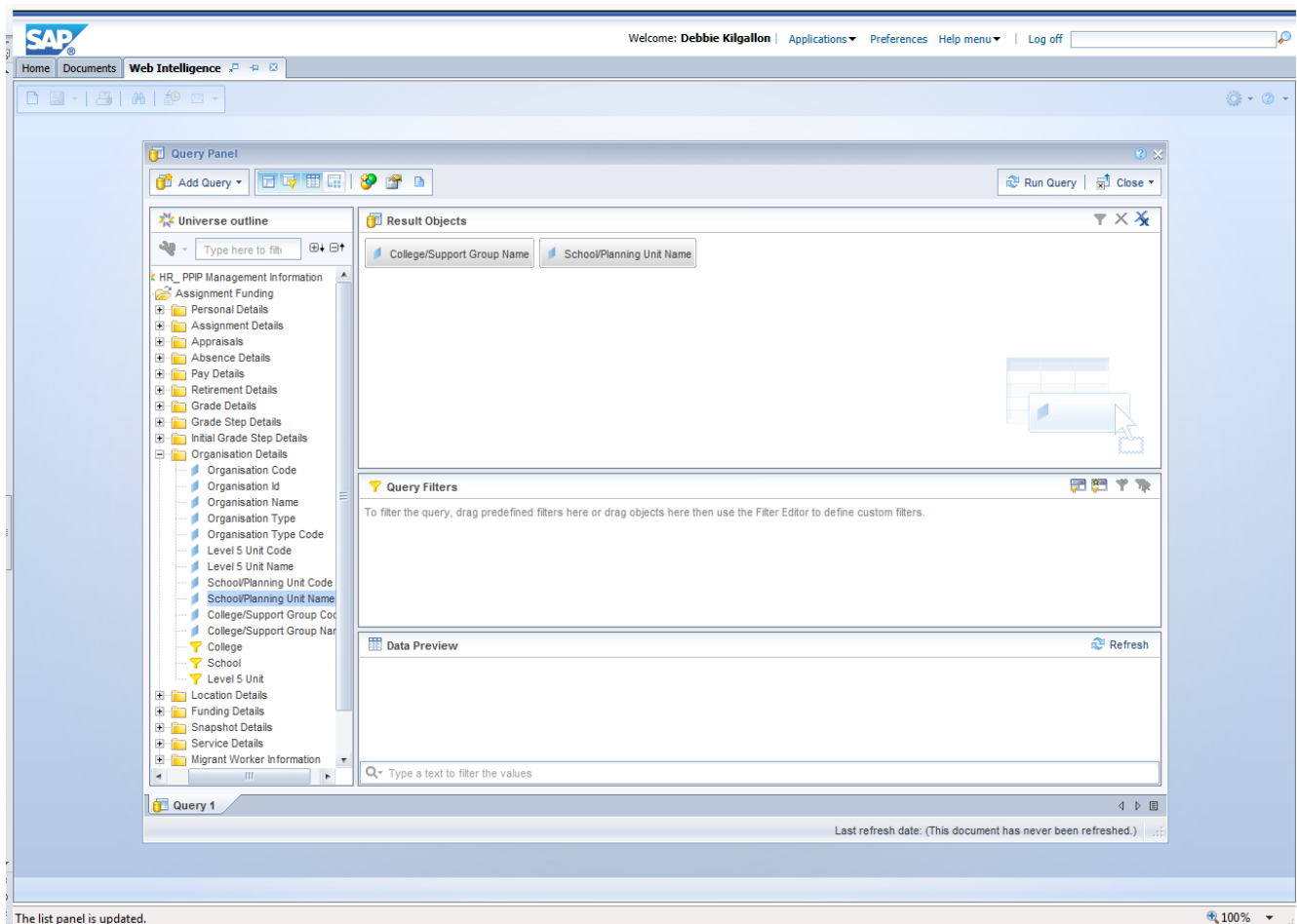- ➤ Edit the table block which simply changes the information display and retains all the data from the initial query

To edit a query after running, click on the Data Access tab at the top of the screen and click edit. The Query Panel will appear and the objects can be amended. When you click on run query again the query will run with the amendments which have been made. Note that the new objects will not automatically appear in the report but will show in the 'data' panel at the left of the screen. You will need to drag and drop them into the report to add the information.

Section 4: Restricting Data

Applying Conditions to a Query Object

Sometimes, you will want to restrict a query so that it returns data related to a subset of values for an object rather than all the values

e.g. you may wish to see data for a certain School rather than the whole College.

A condition has 3 elements:

School/Planning Unit   Equal to   School of Law

Object

Operator

Operand
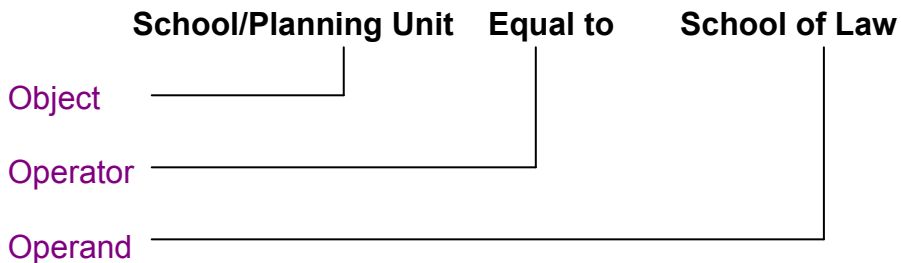
There are several different types of conditions that you can use in BI Suite:

1. Single and multi-value conditions
2. Prompted condition
3. Multiple conditions

1. Single and multi-value conditions. In a single value condition you limit the data returned to one single value for that object. E.g. School equal to School of Law
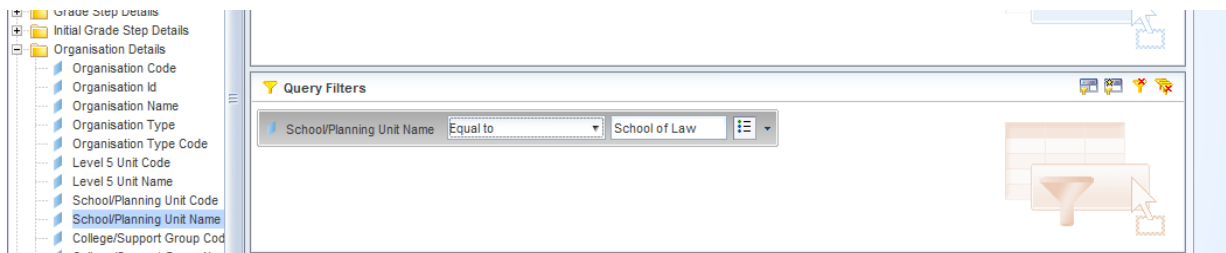
Multi-value conditions allow you to select multiple values by using a different operator such as In List. To select multiple values select 'Value(s) from list'.

If 'Value(s) from list' is selected, a list of options is displayed. Several operands can be selected by double clicking each one or pressing the arrow to move them into the 'Value(s) selected' box. See example below – The Schools of Chemistry and Divinity are selected.
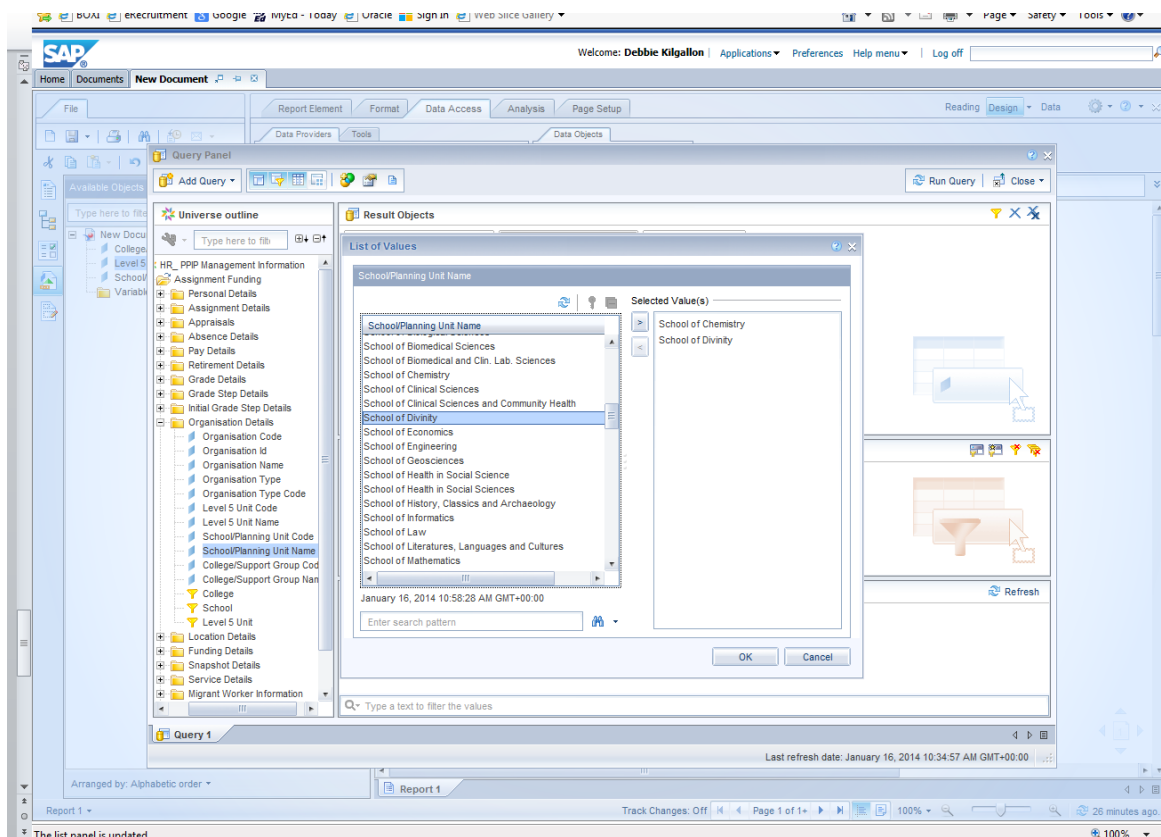
2. Prompted condition. Choose 'Prompt' instead of 'Value(s) from list'. When the query is run, the user must select from the list of values (see below)
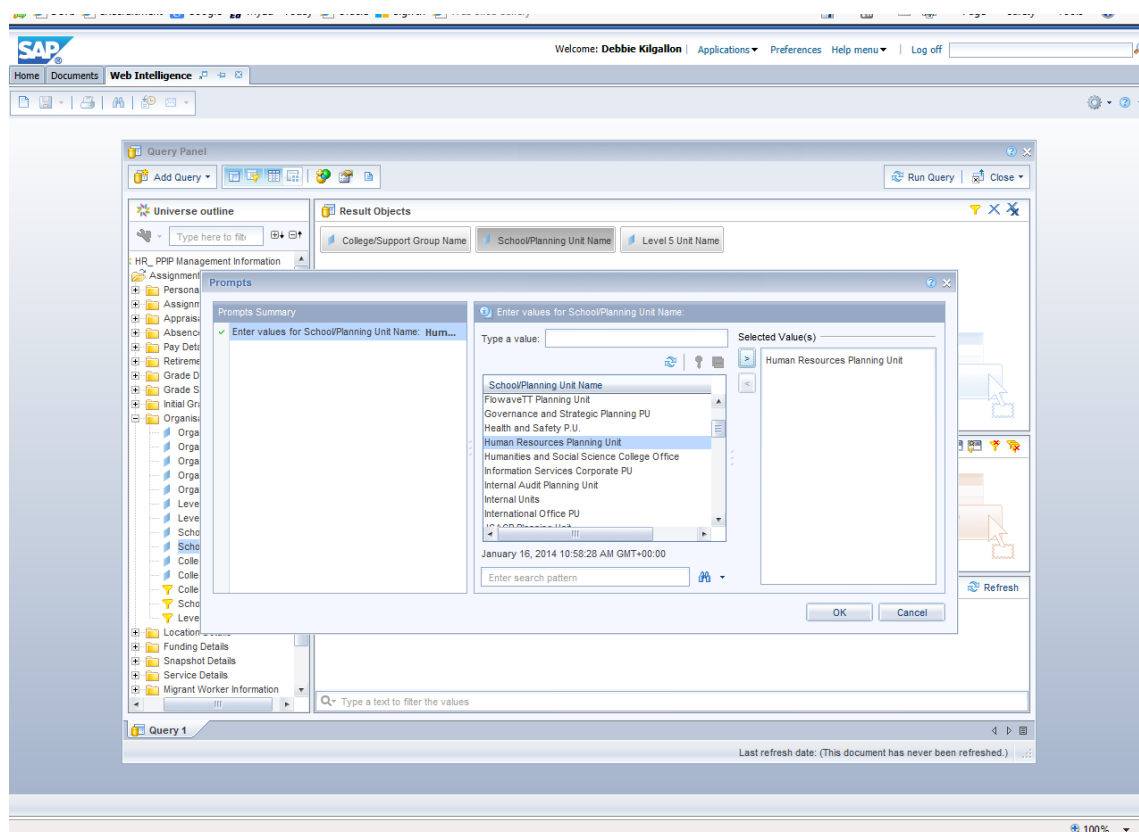
3. Multiple Conditions. Conditions can also be combined to increase control over the data a document contains. To combine conditions, add them to your query. BI Suite automatically combines them with an 'and' (as shown below). Once combined, you can determine how the conditions work together by changing the logical operator from 'and' to 'or' which broadens the scope of the query, as the data retrieved can meet either the first or the second condition to be valid. When using 'and', the data must meet with both conditions.

If there are three or more conditions in the query, they can be bracketed together.

To bracket conditions click on one of the conditions and drag it on top of the other condition and let it go. This will bracket the two conditions together separate from any other conditions that you have in the query. To change the operator from and to or (and vice versa), click on the one which is displayed.

You can use as many brackets on the page as the conditions allow.
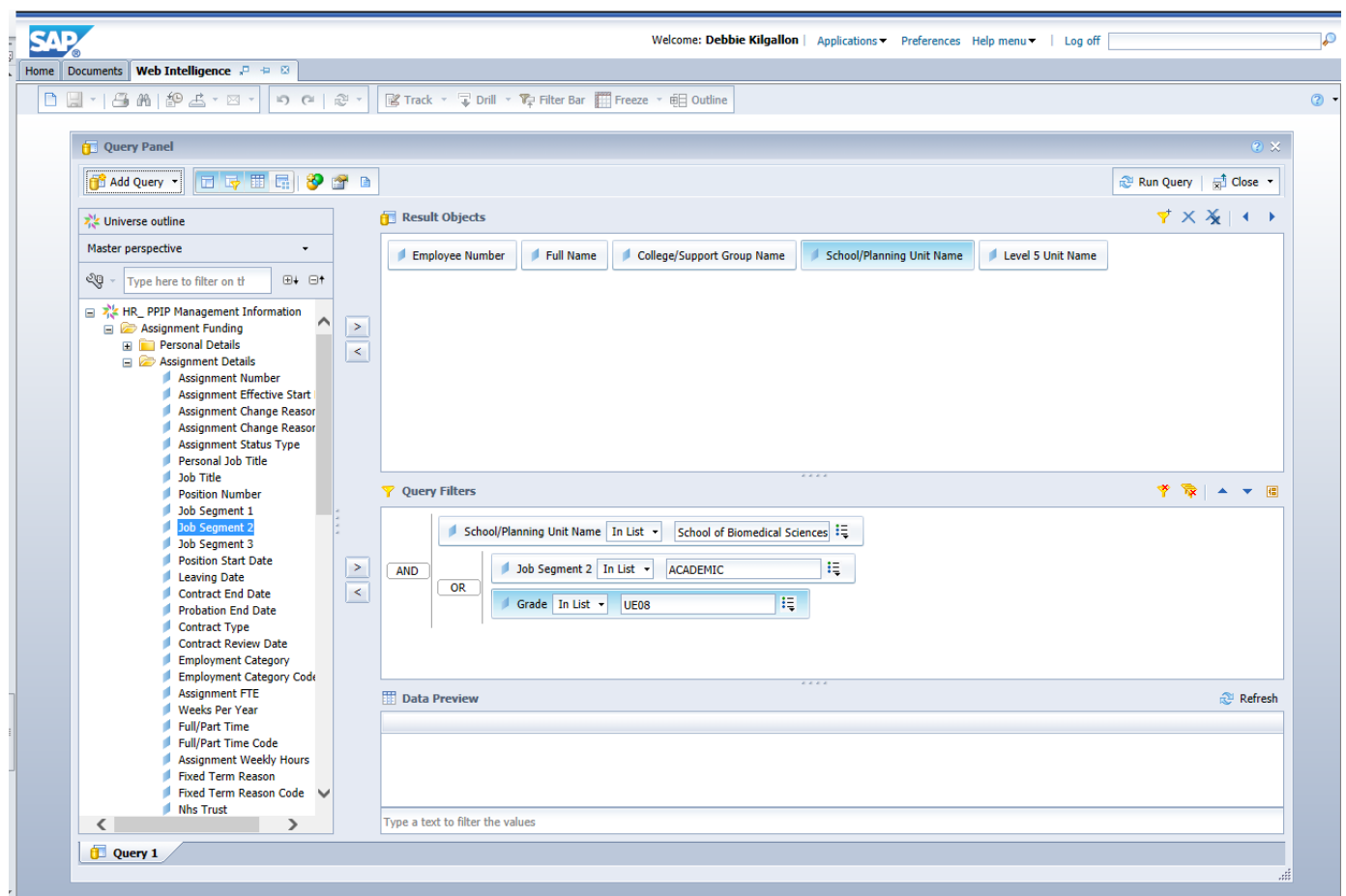
The above query will show all staff in the School of Biomedical Sciences with a grade of UE08 or a Job Segment 2 of Academic